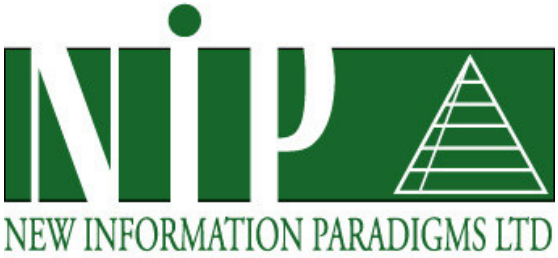
Centre of Excellence London



Contracts Register Service

User Guide

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CONTENTS

1.	Purpose	3
2.	Background	3
3.	Scope and Objectives	4
4.	Getting Started	7
5.	Using the System	9
5.1	Access Levels	9
5.2	Read Only Access	9
5.3	Read and Edit Access	15
5.4	Organisation Administrator Access	20
5.5	Group Administrator Access	22
6.	OGC Buying Solutions	23
6.1	Accessing the OGC Buying Solutions Contracts	23
Appendix 1 – Data Standards		24
Appendix 2 – Maintaining Your Contracts Register Entries		25
Appendix 3 – Valid Contract Types		26

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1. PURPOSE

This document sets out the activities required to successfully set up, use and maintain the Contracts Register Service (CRS).

2. BACKGROUND

The initial specification of the Contracts Register Service was generated by procurement specialists from the Procurement Agency for Essex (PAE) at the beginning of 2005. The application was then designed and developed by an independent software company, New Information Paradigms Limited (NIP), and is currently hosted on NIP's servers at their offices in Berkshire. The CRS was trialled in Essex during the late summer and autumn of 2005 and went live in the PAE in November of the same year.

Subsequently, the West London Alliance (WLA) comprising the following authorities – Brent, Ealing, Hammersmith and Fulham, Harrow, Hillingdon and Hounslow (and now Royal Borough of Kensington and Chelsea – trialled the CRS on behalf of the London Centre of Excellence (LCE). In March 2006, the LCE Management Board agreed the recommendation in a paper from the WLA to adopt the CRS across the organisations covered by the LCE.

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3. SCOPE AND OBJECTIVES

The CRS is a web-based on-line service, which requires only a browser and Internet access for any registered organisation to search, update and maintain their contract data. It has been designed to be easy to use and it takes just a couple of minutes to enter a contract into the system. There are search facilities to view the contract data online, but that data can also be easily downloaded into a spreadsheet for further manipulation and 'what if' queries. An upload facility, to add contracts to the system in bulk, is also available on request. Details of the upload can be found on the Contracts Register Service's home page.

The CRS is designed to underpin collaborative working between public sector organisations and to support the ongoing development of the shared services agenda. It does this in many ways, including:

- tracking and managing the ownership, terms and lifecycle of key contracts
- delivering accurate and up-to-date information on current and future contract information
- providing on-line management information
- supporting the planning and coordination of future contract activity, including alignment
- searching and reporting on current and future contracts by category, supplier, value, date etc, including the local government procurement classification (ProClass)
- identifying framework and other shared contracts which can be accessed by other boroughs
- allowing information such as OJEU notices, contract terms, specifications and other supporting documentation to be downloaded
- providing Alert facilities to enable the contract owner to specify how many months ahead of the contract expiry date an email* is sent out, alerting both the contract owner and the department

**this email alert also shows a list of contracts in other authorities, with the same classification, that expire within six months either side of the selected contract's end date.*

GETTING CONTRACTS ON THE CRS – NOW

If you do not have your contracts on the CRS then you will find it difficult to:

- identify other authorities using the same suppliers
- make the most of potential collaborative opportunities
- find where there are existing and possibly better contracts that you could use, which could contribute to cashable savings targets

- inform your internal stakeholders of existing contracts
- ensure you have the best terms and conditions
- work collectively to resist potential price or cost increases

Having your contracts on the CRS will help you to achieve all these things however if you have no data there you will gain little or no benefit.

BARRIERS/DIFFICULTY IN COLLECTING DATA

When you adopt the CRS, you may encounter some of the following barriers:

- Some people do not understand the importance and significance of the CRS and are reluctant to provide data or gave poor quality/incomplete information
- Senior management may not have bought into the CRS with the result that it takes longer to find and log contracts
- Contract information is often difficult to find and can often be locked away in a cupboard or archive
- Contracts are often jealously guarded and some people may be unwilling to share the information
- A corporate contracts register or in some case several registers may already exist

Most of these issues can be addressed through a communications strategy within each organisation and/or a short period of hands on training. Also, the LCE can arrange to visit and explain the CRS to senior managers

PROCLASS HIERARCHY

Local authorities across the country are now taking on board a standard procurement **classification** (not coding) structure known as ***ProClass*** which is included in the CRS. A standard procurement classification is essential to the delivery of the efficiency and service improvement agenda as it:

- Supports the standardisation of management reporting, performance measurement and benchmarking
- Facilitates the exchange and comparison of meaningful information between authorities and other public sector bodies to identify new areas for collaborative working, particularly as a result of undertaking Expenditure Analysis
- Allows business managers to seek opportunities for cost reduction, supplier rationalisation and streamlined contractual arrangements – including support for promoting the shared services agenda
- Underpins closer cooperation with trading partners and critical suppliers, particularly post-contract
- Supports the planning process including the identification of areas where scarce procurement and commercial resources should be focused for maximum benefit to the organisation

- Provides the overarching framework for the successful deployment of ***any*** procurement or e-Procurement system, although these will most likely contain a coding system to support the ordering process

This message was underlined in the ***Efficiency in Civil Government Procurement*** (1998) Report (*ISBN 0947819592*) that said, *"to be effective, collaboration and joint procurement needs full and reliable information about who is buying what, from whom, and through what means. This will entail using a common classification system"*.

It is important to stress that a common procurement classification system is not designed to interfere with or prevent the development of local policies or reporting processes already in place. It is also ***not*** designed or intended to support any of the following activities:

- Analysis of expenditure by supplier
- Support for policies on SMEs / BMEs and/ or economic regeneration
- Catalogue content and/or trade with the private sector
- Budget planning and forecasting

More details can be found on the LCE web site www.lcpe.gov.uk under the Pan London Management Strategies page.

If you have difficulty finding an existing classification that fits your contract then you can ask for assistance or request an addition to the Classification Hierarchy from the LCE who are managing the process. Please send your enquiry to Esther Thomas at esther.thomas@londoncouncils.gov.uk.

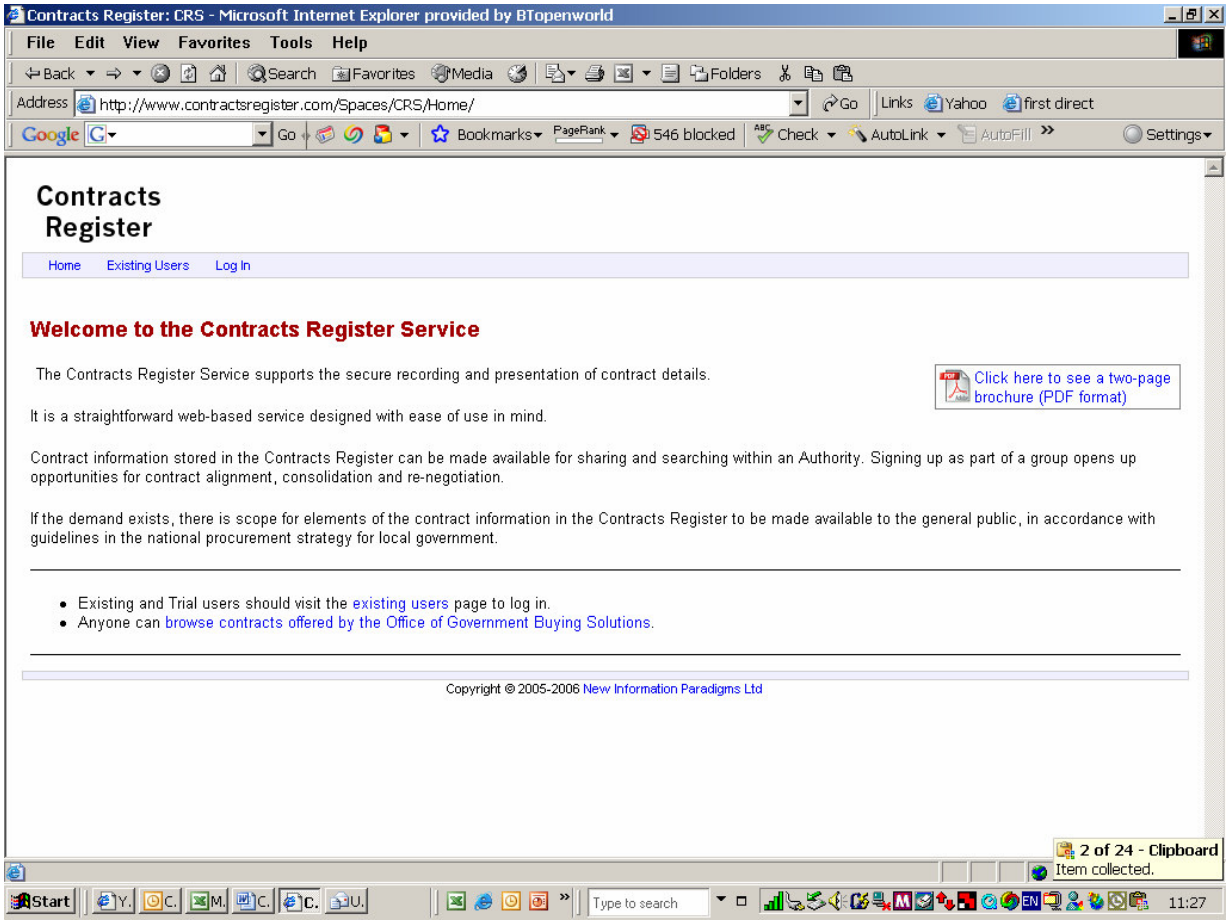
USER GROUP

A User Group has been formed comprising representatives from London Boroughs and the Procurement Agency for Essex (PAE). It is actively working with NIP to ensure that the CRS not only continues to help boroughs gain real benefits, but is also adopted in other regions as a cost effective and easy way of promoting collaborative working. In order to realise the considerable benefits open to public sector organisations the User Group is already determining improvements, requesting new functionality and offering process recommendations to enhance the Service. There is a forum on the CRS for discussion of Issues and suggestions raised as the User Group meetings. It's open to all users of the CRS, not just those who have attended the Group. How to get access to the forum is explained below.

4. GETTING STARTED

To access the CRS go to www.contractsregister.com and you will be presented with the screen shown below. To log in to the system you have two options:

- You can select the **Existing Users** link from the top menu, which will then display a screen showing all the groups of organisations currently using the CRS. Clicking on one of these names will take you to the log in screen for that group.
- Alternatively select the **Log In** link from the top menu, which will take you to a log in screen anyone can use.


Contracts Register: CRS - Microsoft Internet Explorer provided by BTopenworld
File Edit View Favorites Tools Help
Address http://www.contractsregister.com/Spaces/CRS/Home/
Contracts Register
Home Existing Users Log In
Welcome to the Contracts Register Service
The Contracts Register Service supports the secure recording and presentation of contract details.
Click here to see a two-page brochure (PDF format)
It is a straightforward web-based service designed with ease of use in mind.
Contract information stored in the Contracts Register can be made available for sharing and searching within an Authority. Signing up as part of a group opens up opportunities for contract alignment, consolidation and re-negotiation.
If the demand exists, there is scope for elements of the contract information in the Contracts Register to be made available to the general public, in accordance with guidelines in the national procurement strategy for local government.
Existing and Trial users should visit the existing users page to log in.
Anyone can browse contracts offered by the Office of Government Buying Solutions.
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2 of 24 - Clipboard
Item collected.
Start
Type to search
11:27

On the log screen (shown below for the LCE space) you should enter your username (which is usually your email address) and your unique password to gain access to the system.

Your username is usually your email address, and the password should be something you can easily remember but which has a meaning only to you. Both of these can be set within the system, and this will be demonstrated later in this User Guide.

Users are set up with one of the following levels of access:

- Group Administrator
- Organisation Administrator
- Read and Edit
- Read only

You can see what level of Access you have to the system by clicking on the **My Details** link in the menu bar once you are logged in.

5. USING THE SYSTEM

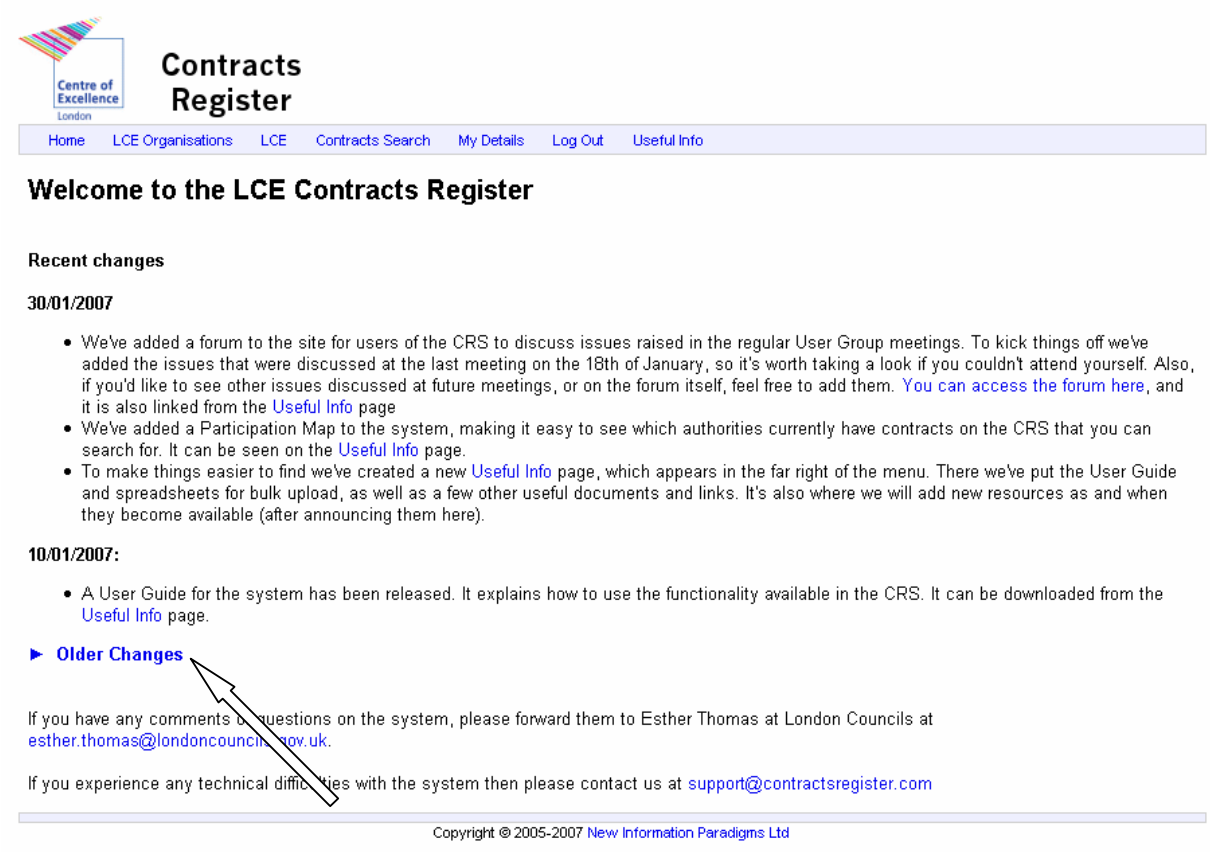
5.1 ACCESS LEVELS

The system has 4 levels of access – Read Only, Read/Edit, Organisation Administrator and Group Administrator. All the functions available at Read Only level are available to Read/Edit and both Administrator levels, all the functions at Read/Edit level are available at both Administrator levels, and all the functions available at Organisation Administrator are available at Group Administrator Level.

5.2 READ ONLY ACCESS

5.2.1 LOG ON SCREEN

When you have logged on to the system as a Read Only user you will see this screen


Centre of Excellence London
Contracts Register
Home
LCE Organisations
LCE
Contracts Search
My Details
Log Out
Useful Info
Welcome to the LCE Contracts Register
Recent changes
30/01/2007
We've added a forum to the site for users of the CRS to discuss issues raised in the regular User Group meetings. To kick things off we've added the issues that were discussed at the last meeting on the 18th of January, so it's worth taking a look if you couldn't attend yourself. Also, if you'd like to see other issues discussed at future meetings, or on the forum itself, feel free to add them. You can access the forum here, and it is also linked from the Useful Info page
We've added a Participation Map to the system, making it easy to see which authorities currently have contracts on the CRS that you can search for. It can be seen on the Useful Info page.
To make things easier to find we've created a new Useful Info page, which appears in the far right of the menu. There we've put the User Guide and spreadsheets for bulk upload, as well as a few other useful documents and links. It's also where we will add new resources as and when they become available (after announcing them here).
10/01/2007:
A User Guide for the system has been released. It explains how to use the functionality available in the CRS. It can be downloaded from the Useful Info page.
► Older Changes
If you have any comments or questions on the system, please forward them to Esther Thomas at London Councils at esther.thomas@londoncouncils.gov.uk.
If you experience any technical difficulties with the system then please contact us at support@contractsregister.com
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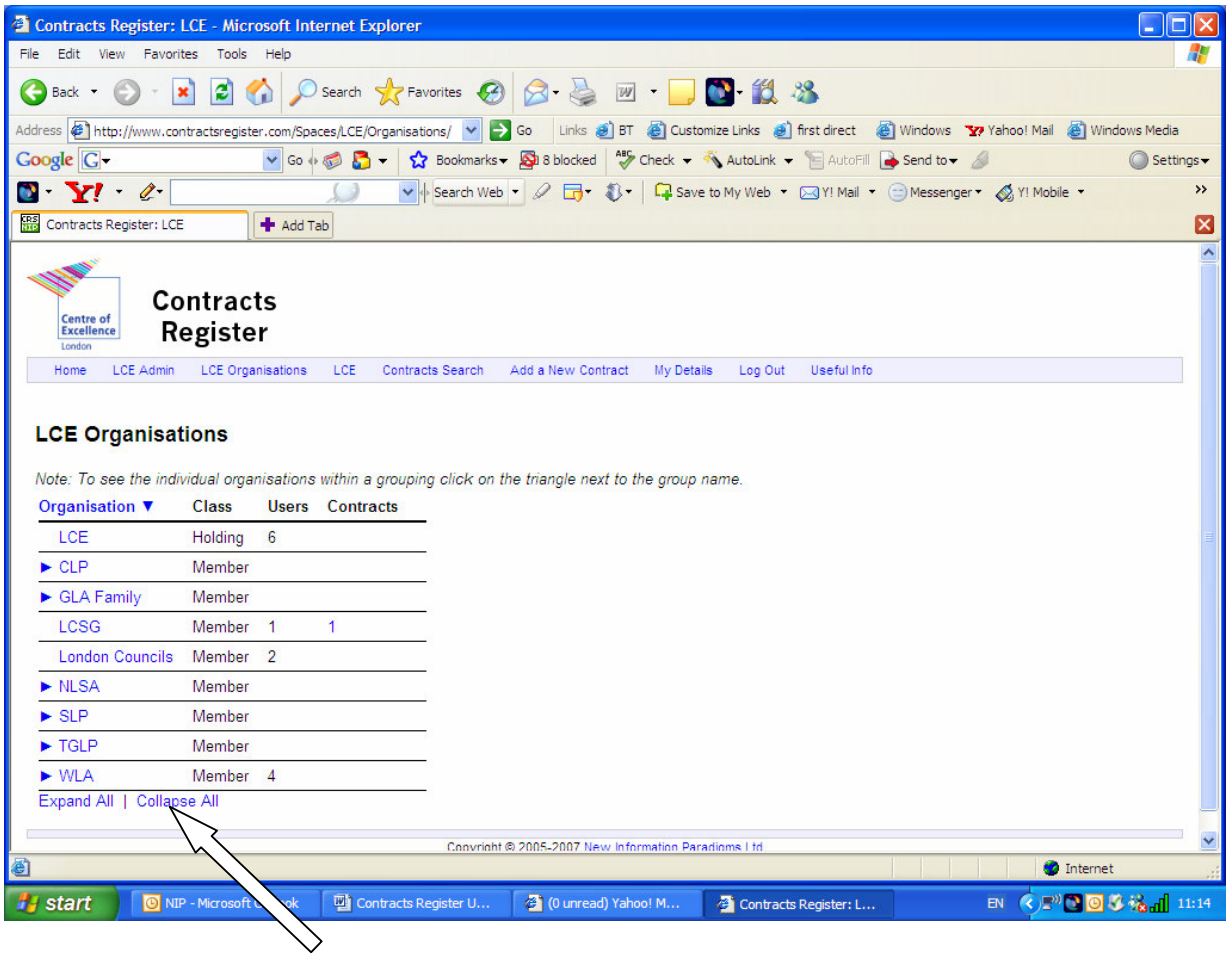
The menu bar at the top of the screen shows all the functions available to you. The **Recent changes** section describes any new functionality which has been added to the system and should be checked on a regular basis. You can see older changes to the system by expanding the **Older Changes** (indicated by

the arrow).

5.2.2 LCE ORGANISATIONS

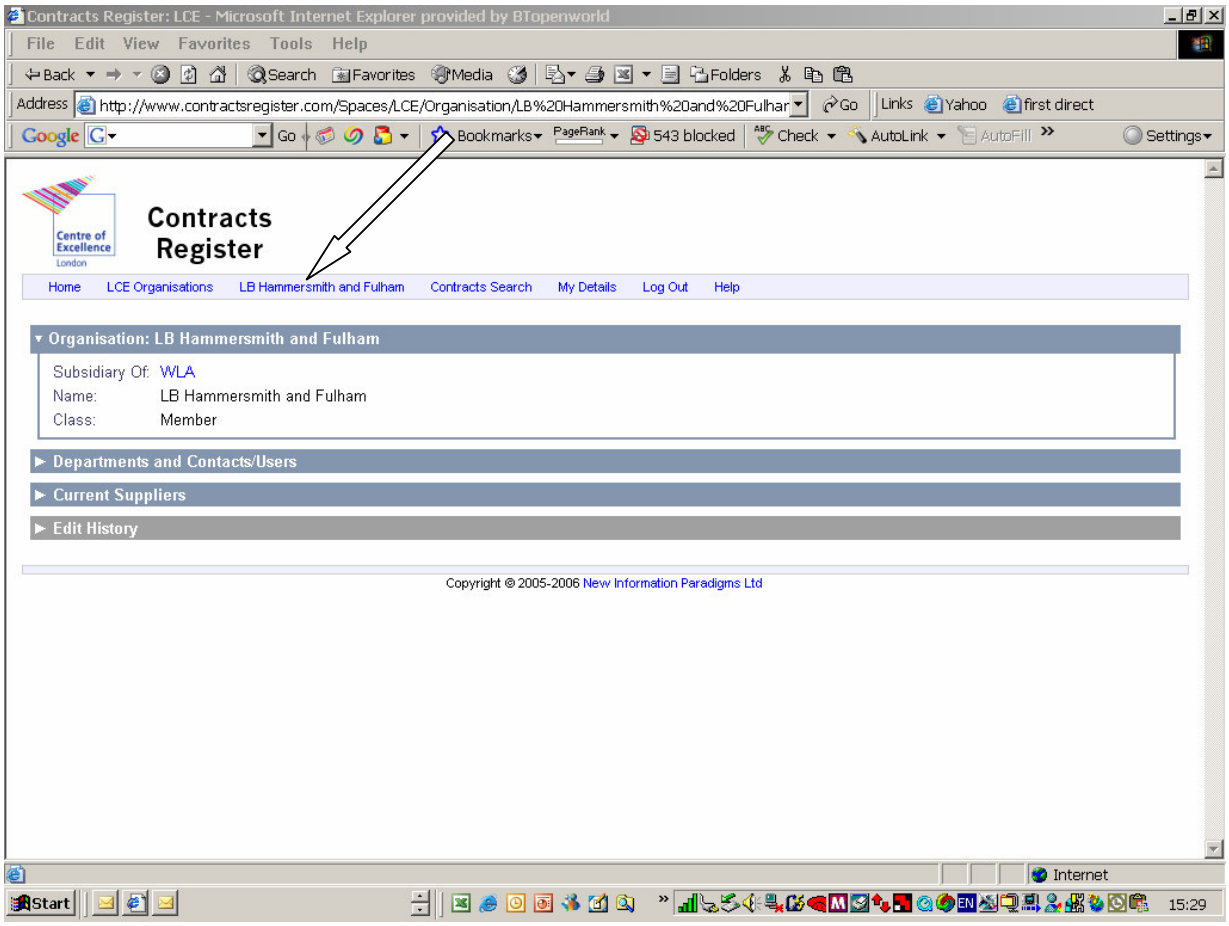
The link in the horizontal menu bar named **LCE Organisations** will show you all the authorities within the LCE, presented in their five subgroups. When a subgroup is expanded a list of the members of that group is shown, displaying for each member the number of active users and the number of contracts they have in the system. To show the subgroups in reverse alphabetical order click the triangle beside the **Organisation** heading of the table.



In addition you can choose to show all organisations or just the subgroups by using the **expand all** / **collapse all** options (indicated by the arrow above).

5.2.3 ORGANISATION NAME

If you click on the name of your Organisation – third from the left on the menu bar – you will see the screen shown below. In this example we are logged in as LB Hammersmith and Fulham.



The screen is divided into 4 sections, each of which is described below. To see the detail of each section click on the triangle next to that section's name.

ORGANISATION

This section shows the title of your organisation, the subgroup to which the organisation belongs and whether it is a member or holding organisation – "Holding" is used for the LCE itself or one of the subgroups e.g. WLA.

DEPARTMENTS AND CONTACTS / USERS

This section lists by department all the users and contacts in the system with their email address and access level. Clicking on an individual user will take you to a screen showing their details, which includes a list of all the open contracts for which that user is the contact.

CURRENT SUPPLIERS

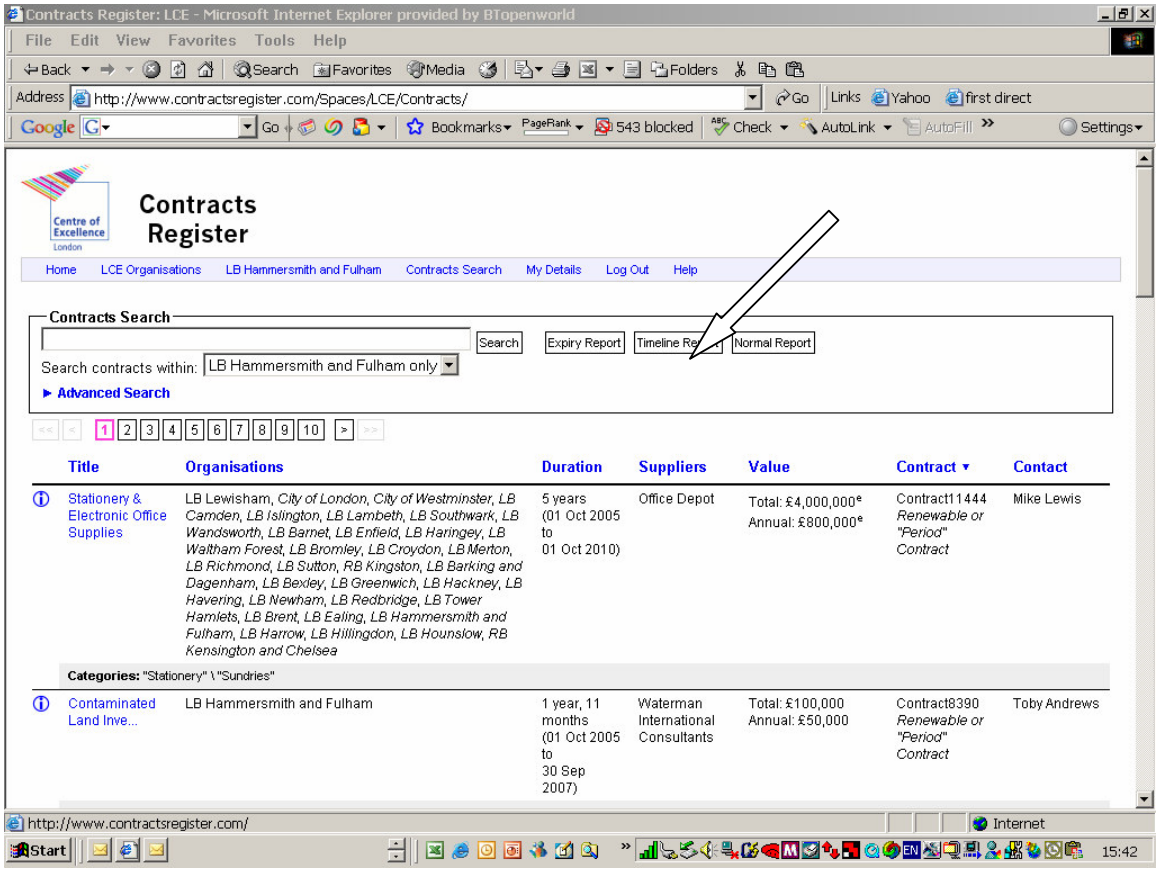
This section lists in alphabetical order all the suppliers your organisation currently has contracts with and any associated suppliers details which have been entered. If you then click on a supplier's name a list of contracts for that supplier will be displayed.

EDIT HISTORY

This section shows the history of when a contract was added, updated or deleted and by whom.

5.2.4 CONTRACTS SEARCH

The 4th option in the menu bar, **Contracts Search**, defaults to a screen showing all of the contracts on the CRS for the authority you belong to (shown below). The drop down list labelled "Search contracts within" allows you to search for contracts from your own authority, your subgroup or the whole of the LCE. Additionally, by clicking on one of the buttons to the right of the 'Search' button, you can display the results sorted by expiry date (by selecting **Expiry Report),** and/or display the results graphically (by selecting **Timeline Report)**. If you click on a column heading written in **blue** then the information will be sorted in that sequence – if you click a second time on the same heading the order of the data presented will be reversed i.e. from ascending to descending. A small **blue** triangle next to a column heading indicates the sort criteria e.g. in the example below the results are sorted by **Contract**.


Contracts Register: LCE - Microsoft Internet Explorer provided by BTopenworld
File Edit View Favorites Tools Help
Address http://www.contractsregister.com/Spaces/LCE/Contracts/
Contracts Register
Home LCE Organisations LB Hammersmith and Fulham Contracts Search My Details Log Out Help
Contracts Search
Search
Expiry Report
Timeline Report
Normal Report
Search contracts within: LB Hammersmith and Fulham only
Advanced Search
Title
Organisations
Duration
Suppliers
Value
Contract
Contact
Stationery & Electronic Office Supplies
LB Lewisham, City of London, City of Westminster, LB Camden, LB Islington, LB Lambeth, LB Southwark, LB Wandsworth, LB Barnet, LB Enfield, LB Haringey, LB Waltham Forest, LB Bromley, LB Croydon, LB Merton, LB Richmond, LB Sutton, RB Kingston, LB Barking and Dagenham, LB Bexley, LB Greenwich, LB Hackney, LB Havering, LB Newham, LB Redbridge, LB Tower Hamlets, LB Brent, LB Ealing, LB Hammersmith and Fulham, LB Harrow, LB Hillingdon, LB Hounslow, RB Kensington and Chelsea
5 years (01 Oct 2005 to 01 Oct 2010)
Office Depot
Total: £4,000,000e Annual: £800,000e
Contract11444 Renewable or "Period" Contract
Mike Lewis
Categories: "Stationery" \ "Sundries"
Contaminated Land Inve...
LB Hammersmith and Fulham
1 year, 11 months (01 Oct 2005 to 30 Sep 2007)
Waterman International Consultants
Total: £100,000 Annual: £50,000
Contract8390 Renewable or "Period" Contract
Toby Andrews
http://www.contractsregister.com/
Internet
Start
15:42

Use the numbers below the search box to scroll through the contracts. To see more information about a

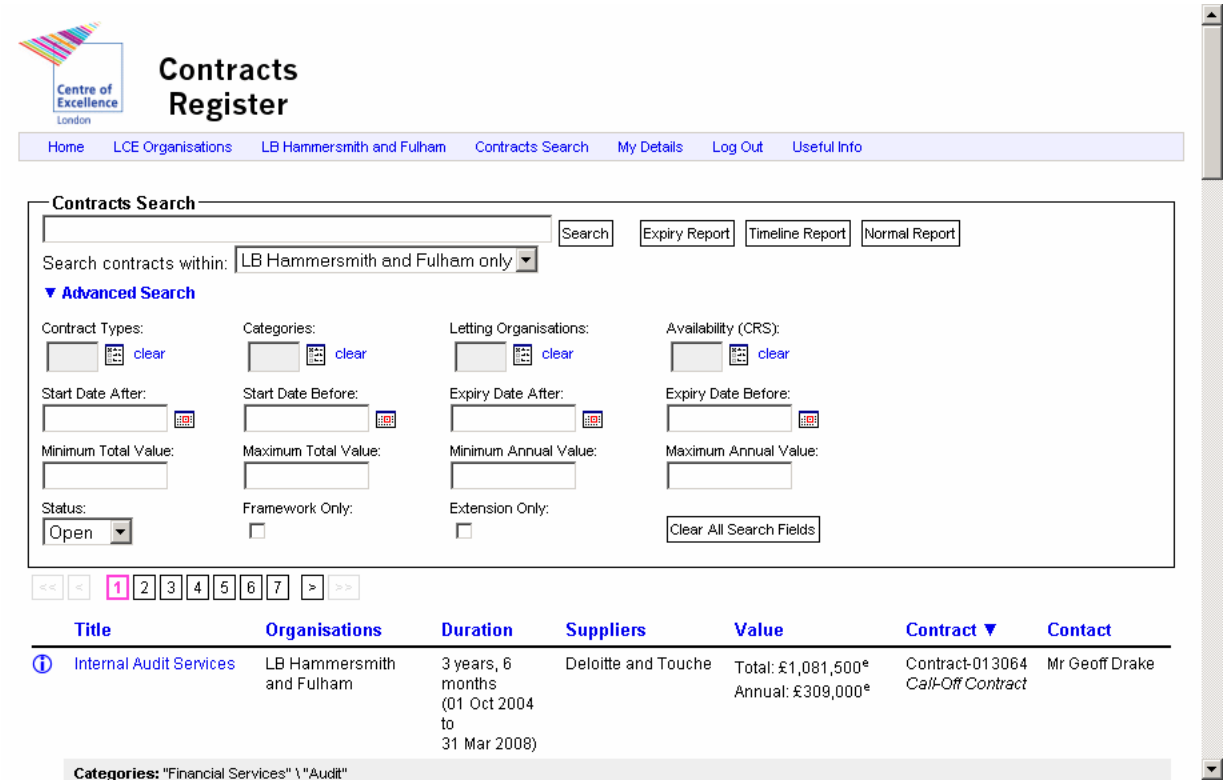
particular contract either click on the "I" icon next to the contact's Title for summary information, or the Title itself for the full contract details.

Where there are multiple entries in the Organisations column the entry in normal type is the authority that let the contract and those in italics are those organisations the contract is available to. When searching for contracts within a particular organisation you will not include contracts that are just available to it. To search for those contracts use the advanced search options explained below.

At the bottom of the screen there is an option to download these contracts into an Excel spreadsheet for further interrogation.

ADVANCED SEARCH

If you expand the advanced search option, by clicking on the triangle next to "Advanced Search", you will see the following screen



You now have the option to refine the search to show the types of contract you are specifically interested in. There is no limit to the number of different criteria you can set on each search. To fill in a field either click on the icon next to it and select the value(s) you require, or if the field is not greyed out, you can type directly into the field itself. Data can be presented in expiry date order and/or timeline format as explained in the previous section of this User Guide.

To clear values you have set for individual fields select the **clear link next to them** – to clear everything and start again select "**Clear all Fields**". Remember the search will always default to show data only for your own organisation unless you actively specify otherwise.

5.2.5 USEFUL INFO

The final option in the menu bar is **Useful Info** (previously called **Help**), a page where there are a number of resources to help you get the most out of the CRS. There's a brief description of each of the current resources below.

USER GUIDE

Here you can download this User Guide from the site. It is worth checking you have the latest version every month or so to see if there have been any updates made.

USER GROUP ISSUES FORUM

As mentioned about there is a forum for discussion of issues raised at User Group meetings. It is open to all users, and you are encouraged to raise any issues you have with the site there. To go to the forum click on the link on the Useful Info page, and follow the instructions you are given.

Once there feel free to add your thoughts to an existing topic, or to raise new issues yourself by starting a new one. If you'd like to learn how to use the forum there's a simple guide below, although we'd recommend you take a look at the FAQ (Frequently Asked Questions). You'll find the link at the top of each page of the forum.

To view an existing topic click on its name on the main forum view. To make a contribution to a topic click on the 'Post Reply' button either at the top or bottom of its page.

To start a new topic for discussion click on the 'New Topic' button which you'll find at the top and bottom of the main forum page and on individual topic pages as well.

Once you either start a topic or respond to an existing one you'll be taken to a screen where you can type your message. You can add a subject and type the main body of the message, just like an email. You can add simple formatting called BBCode (such a bold text, or underlining) to your message if you wish by using the buttons above the space where you type your message. A more detailed description of how to use BBCode is in the FAQ (mentioned above).

Once you've finished your message you can view how it will look on the forum by clicking on the 'Preview' button. This will also allow you to make any changes you require. Once you're happy with the message click on the 'Submit' button, and your message will be posted to the forum for everyone to read.

LIST OF SUPPLIERS

Here you can see an alphabetical list of all the suppliers in the system. Clicking on a supplier's name will take you to their details and allow you to see what contracts for that supplier are on the Contracts Register. One of the problems potentially facing the Register is inconsistency in the naming of suppliers, to mitigate against this the LCE has prepared some guidance on being consistent with supplier names which can be downloaded here.

BULK UPLOAD

Here you can download a spreadsheet to allow you to upload data in bulk to the CRS, useful if you have a lot of contracts to input. To find out how to use the spreadsheet download the 'Master Spreadsheet Notes' document.

PROCLASS HIERARCHY

Here you can download a PDF of all the ProClass Hierarchy which is used to categorise the contracts on the CRS.

PARTICIPATION MAP

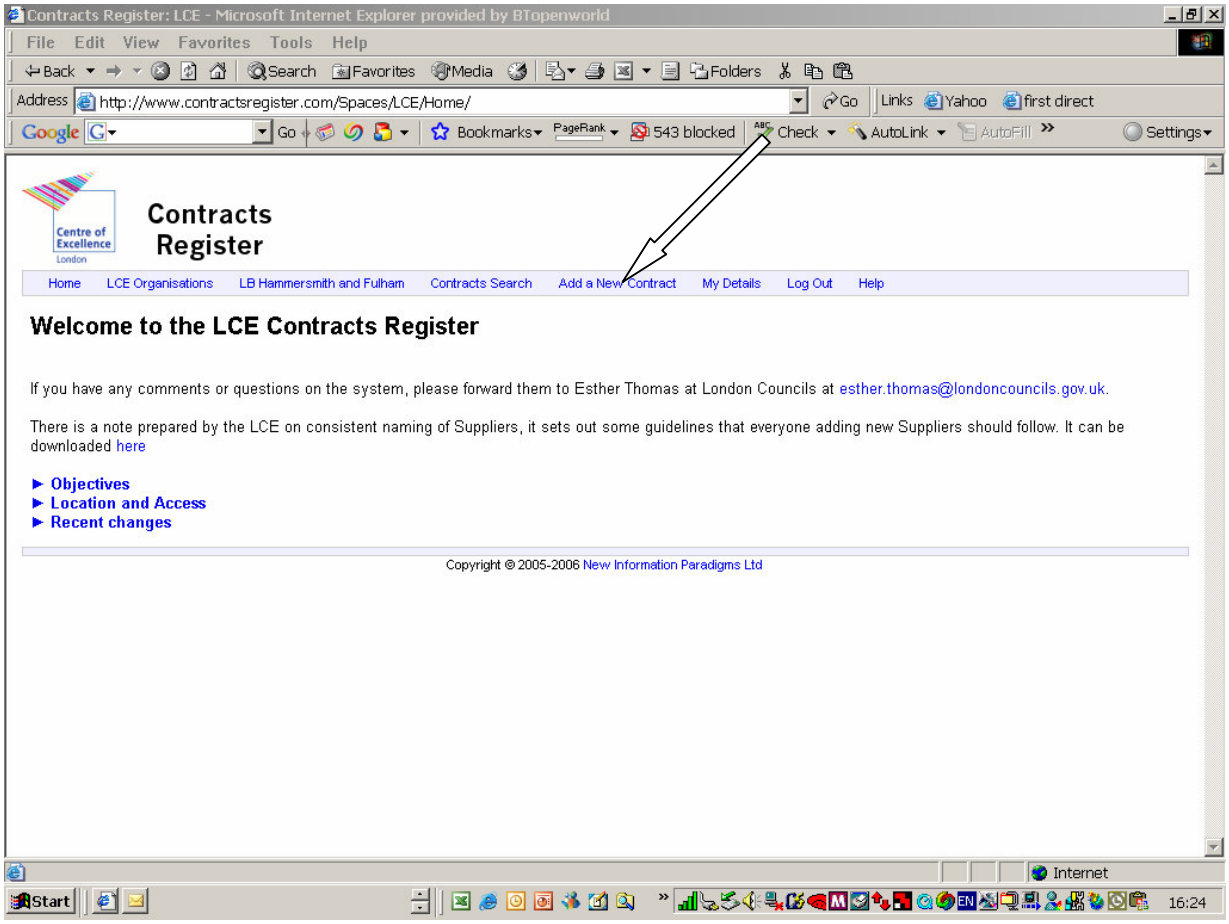
Here you can see various maps of the authorities participating in the CRS:

- CRS Participation Map – shows how many contracts and users each authority has on the CRS
- CRS New Contract Activity Map – shows new contracts entered each month by authority
- CRS Contract Update Activity Map – shows how many contracts have been updated each month by authority

There is a key below each map explaining what the different colours mean.

5.3 READ AND EDIT ACCESS

Users with this level of access have all the functionality available to Read Only users as well as being able to add new contracts to the register and edit existing ones. After successfully logging on to the system the following screen will be displayed, identical to that for Read Only users apart from an extra option in the top menu bar, **Add a New Contract (indicated by the arrow below)**.


Contracts Register: LCE - Microsoft Internet Explorer provided by BTopenworld
File Edit View Favorites Tools Help
Address http://www.contractsregister.com/Spaces/LCE/Home/
Contracts Register
Home LCE Organisations LB Hammersmith and Fulham Contracts Search Add a New Contract My Details Log Out Help
Welcome to the LCE Contracts Register
If you have any comments or questions on the system, please forward them to Esther Thomas at London Councils at esther.thomas@londoncouncils.gov.uk.
There is a note prepared by the LCE on consistent naming of Suppliers, it sets out some guidelines that everyone adding new Suppliers should follow. It can be downloaded here
► Objectives
► Location and Access
► Recent changes
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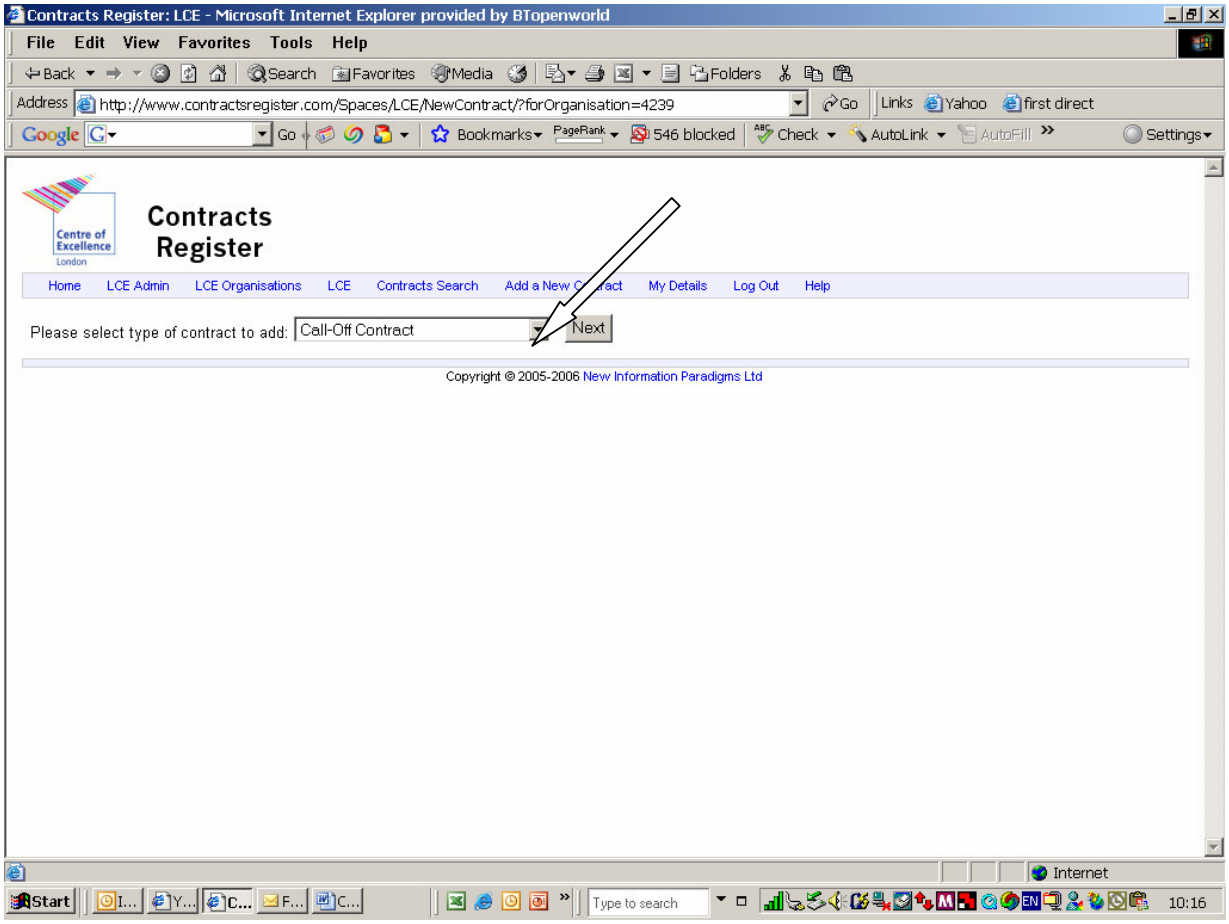
Internet
Start
16:24

ADD A NEW CONTRACT

To add a new contract to the register select the **Add a New Contract** menu item and the following screen will be displayed. Click on the drop down list to show a list of all the valid contract types which can be added to the register. Select the required type and click next.


Contracts Register: LCE - Microsoft Internet Explorer provided by BTopenworld
File Edit View Favorites Tools Help
Address http://www.contractsregister.com/Spaces/LCE/NewContract/?forOrganisation=4239
Contracts Register
Home LCE Admin LCE Organisations LCE Contracts Search Add a New Contract My Details Log Out Help
Please select type of contract to add: Call-Off Contract Next
Copyright © 2005-2006 New Information Paradigms Ltd

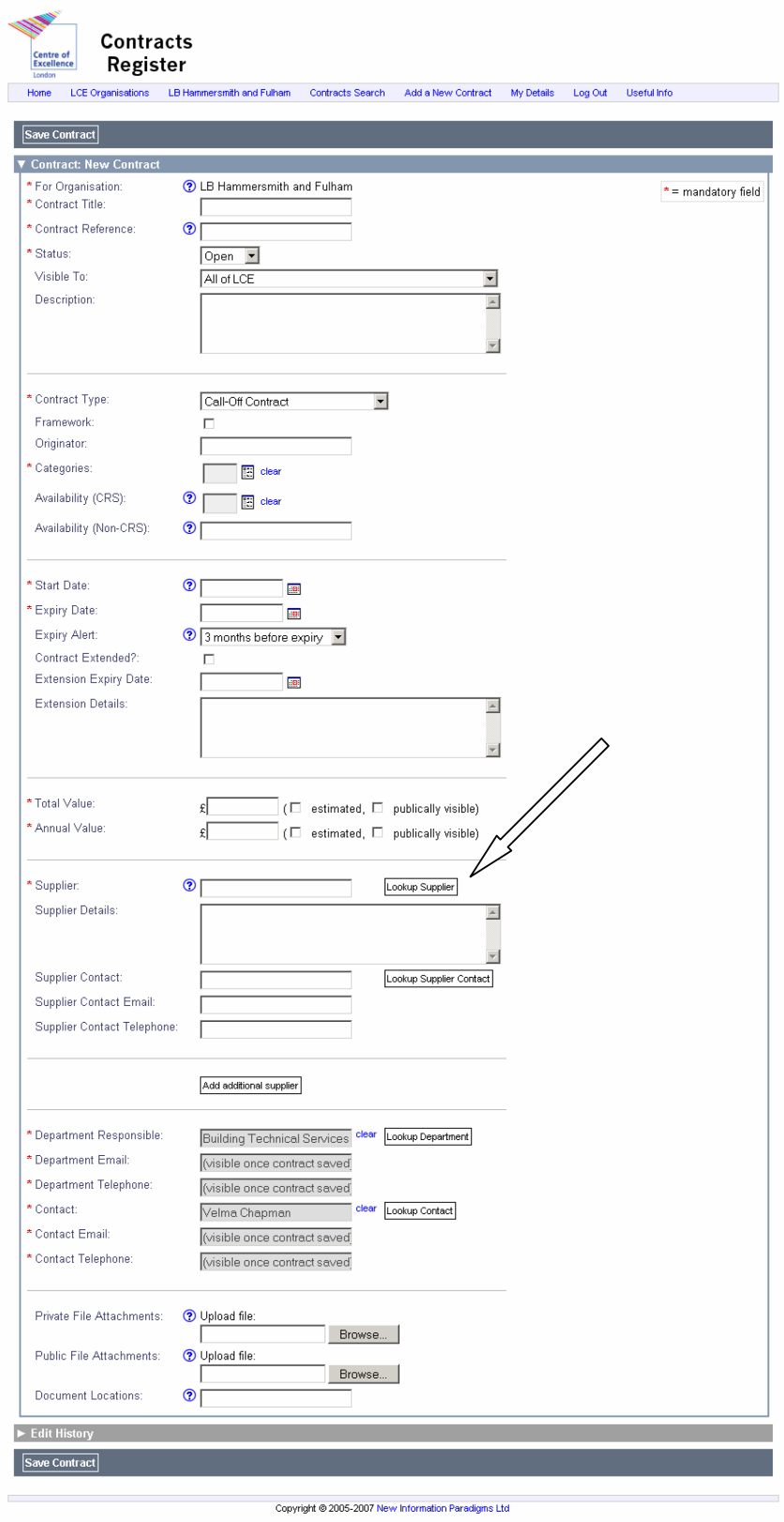
The screen shown below is then presented for you to start to enter the contract details. All fields with a red asterisk (*) beside them are mandatory and the contract will not be uploaded if they are not completed. If you do not have all of the information available but still wish to load the contract then nominal details such as Department Email can be entered as TBA or TBC and similarly for department telephone numbers – either enter the switchboard number or TBC.

The register is not available for the public to view at present however when it is available then the value fields can be withheld from the public view as will be the Contract Manager details – only the departmental data will be displayed.

Help is available for each field that has a **?** next to it – click on this symbol and the help text will be displayed. **It is recommended that you read each bit of help text as it often explains the intended use of the field.**

NOTE ON ENTERING SUPPLIERS

When entering a new contract please make sure to use the 'Lookup Supplier' button (its use is explained below), This allows you to choose suppliers from those already entered on to the CRS, reducing the amount of duplication on the system and meaning it is easier to see which suppliers are supplying more than one authority in London.


Contracts Register
Home
LCE Organisations
LB Hammersmith and Fulham
Contracts Search
Add a New Contract
My Details
Log Out
Useful Info
Save Contract
Contract: New Contract
* = mandatory field
* For Organisation:
LB Hammersmith and Fulham
* Contract Title:
* Contract Reference:
* Status:
Open
Visible To:
All of LCE
Description:
* Contract Type:
Call-Off Contract
Framework:
Originator:
* Categories:
clear
Availability (CRS):
clear
Availability (Non-CRS):
* Start Date:
* Expiry Date:
Expiry Alert:
3 months before expiry
Contract Extended?:
Extension Expiry Date:
Extension Details:
* Total Value:
£
(estimated, publically visible)
* Annual Value:
£
(estimated, publically visible)
* Supplier:
Lookup Supplier
Supplier Details:
Supplier Contact:
Lookup Supplier Contact
Supplier Contact Email:
Supplier Contact Telephone:
Add additional supplier
* Department Responsible:
Building Technical Services
clear
Lookup Department
* Department Email:
(visible once contract saved)
* Department Telephone:
(visible once contract saved)
* Contact:
Velma Chapman
clear
Lookup Contact
* Contact Email:
(visible once contract saved)
* Contact Telephone:
(visible once contract saved)
Private File Attachments:
Upload file:
Browse...
Public File Attachments:
Upload file:
Browse...
Document Locations:
Edit History
Save Contract
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Where the choice of data to be entered into a field is pre-defined there are either drop-down lists or pop-up boxes showing the available options to choose from. An example of a list field is **Contract Type**, to view the options to choose from click on the arrow to the right of the box (you can only choose one). An example of a pop-up box field is **Categories**, to view the list of options click on the icon to the right of the field. A box will pop-up listing the options and you can choose as many as you like (so, for example, each contract can have multiple categories selected).

Fields that require you to enter dates, such as **Start Date,** have calendar icons beside them. Clicking on the icon will bring up a calendar from which you can select the date you require by clicking on it.

Several sets of fields can be filled in via **Lookup …** buttons. These fields can be filled in by manual typing like normal text fields, however they can also be automatically filled in with information already in the system. For example the **Supplier** and **Supplier Details** fields: clicking the **Lookup Supplier** button will pop-up a box showing all the suppliers who have already been entered onto the CRS. Selecting one of these suppliers will cause their details to be entered into the fields automatically. One thing to note about the pop-up box here is the **Name begins** field, typing a few letter in there and pressing enter will show you a list of all suppliers whose name begins with those letters making finding the supplier needed from the long list much easier.

Other **Lookup …** buttons which function in a similar way are:

- **Lookup Supplier Contact**, which allows you to choose contacts to fill in the **Supplier Contact**, **Supplier Contact Email** and **Supplier Contact Telephone** fields
- **Lookup Department**, which allows you to choose departments to fill in the **Department Responsible**, **Department Email** and **Department Telephone** fields
- **Lookup Contact**, which allows you to choose contacts to fill in the **Contact**, **Contact Email** and **Contact Telephone** fields

If more than one supplier is involved in the contract then click on the **Add Additional Supplier** button and fill in their details in the extra fields that will be added to the form – there is no limit to the number of additional suppliers which can be added to a contract.

Finally there is an option to attach relevant documents to the contract – you can chose whether these documents are made visible to the Public or not by attaching them to the relevant category.

Examples of these documents are an OJEU Notice or a specification. Select the browse option for either Public or Private File Attachments, find the document you want to attach and click on it to make the attachment.

USING THE COPY FACILITY TO ADD A CONTRACT

If you want to add a contract which is similar to an existing contract, search for the contract on the register and click the **Copy Contract** button from the bar at the top of the contract form. The screen displayed will contain details of the contract you have chosen to copy. Change the relevant fields and then select the **Save Contract** button to upload a new contract.

EDIT AN EXISTING CONTRACT

To edit an existing contract search for the contract you want to change using the search facility. Click the **Edit Contract** button from the bar at the top of the Contract form and the screen displayed will contain details of the contract you have chosen to edit. Change the relevant fields and then select the **Save Contract** button to save the changes to the contract.

5.4 ORGANISATION ADMINISTRATOR ACCESS

When you have logged on as an organisation administrator you will see the screen shown below. You will be able to access all the functionality available to users with Read Only and Read and Edit access as well the extra ones described below.

AUTHORITY DETAILS

As an organisation administrator you have the ability to edit the details of your authority. Click on your organisation's name – the 3rd link in the menu bar – and you will be presented with the following screen. It is similar to that described in the Read Only section (page 9), except that there is another section (Recent Contract Activity) and two buttons at the top (Edit Organisation and Top Suppliers by Expenditure). These extra options are explained below, along with new functionality in the Departments and Contacts/Users section.

EDIT ORGANISATION

This will allow you to change the title of your organisation, change the subgroup to which the organisation belongs and to determine whether it is a member or holding organisation (holding is used for the LCE itself or one of the subgroups e.g. WLA.). You can also select an email address which the alert mails for your organisation will come from, and any email addresses you would like all alert mails for your organisation to be copied to.

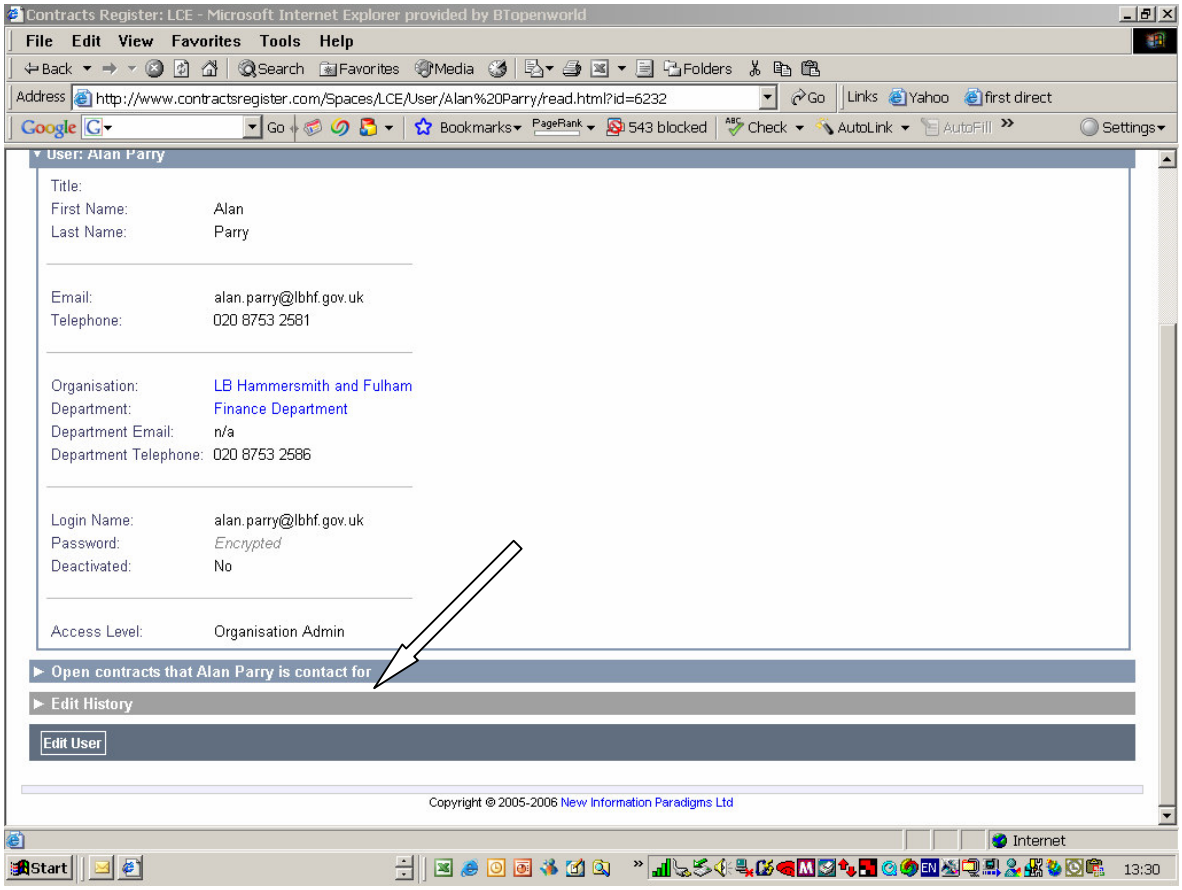
TOP SUPPLIERS BY EXPENDITURE

This will show you a list of the top 50 suppliers by spend that your organisation used in the last financial year – **n.b.** this information is only available to organisations who submitted data for the 2005/6 Expenditure Analysis run by the LCE and the PAE. The suppliers are sorted by descending value of spend i.e. biggest spend at the top of the screen.

DEPARTMENTS AND CONTACTS/USERS

This will list by department all the users of the system with their email address and access level. At the bottom of this section you have the option to **Create a New Department**, **Create a New Contact** and **Create a New User**.

If you click on an individual user's name then their details will be shown and at the bottom of that screen you will be able to expand a section to view all the open contracts for that user (indicated by the arrow below). You can also delete a contact by clicking on the 'Delete Contact' button at the top of the screen.



RECENT CONTRACT ACTIVITY

This section allows you to look at contracts for your authority that have either

- Been created
- Been updated
- Have expired

in the last seven days. Individual contracts can be selected from the list and the full details displayed by clicking on the contract title displayed in blue type.

5.5 GROUP ADMINISTRATOR ACCESS

Group Administrators have access to all the functionality available to Organisation Administrators. In addition they are also able to access the functionality Organisation Administrators have for their own organisation (explained in section 5.4 above) for each Organisation within their Subgroup.

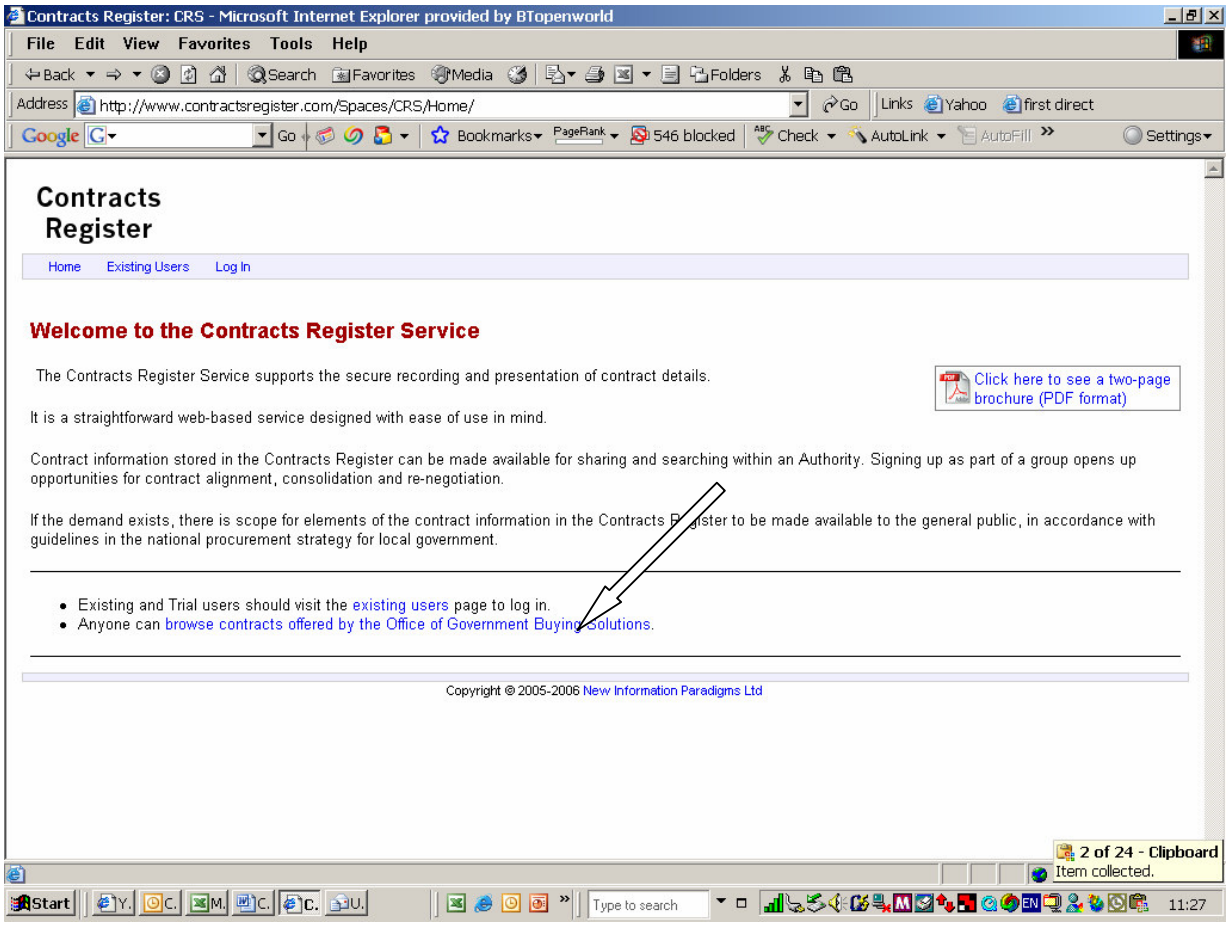
For example someone who is a Group Administrator and is a user for an Organisation within the WLA Subgroup would be able to access the functionality described in section 5.4 for each organisation within the WLA.

Groups Administrators can access the pages of Organisations other than their own, and then use the functionality described in section 5.4, by using the **LCE Organisations** link in the top menu bar (explained in the Read Only Users section of this User Guide).

6. OGC BUYING SOLUTIONS

6.1 ACCESSING THE OGC BUYING SOLUTIONS CONTRACTS

To look at the OGC Buying Solutions contracts click on the link on the Contracts Register Service home page (see the arrow below) and follow the instructions on the screen which is then displayed. All CRS users have read only access to the OGCBS contracts using the search facility described on pages 10 and 11 above.


Contracts Register: CRS - Microsoft Internet Explorer provided by BTopenworld
File Edit View Favorites Tools Help
Address http://www.contractsregister.com/Spaces/CRS/Home/
Contracts Register
Home Existing Users Log In
Welcome to the Contracts Register Service
The Contracts Register Service supports the secure recording and presentation of contract details.
Click here to see a two-page brochure (PDF format)
It is a straightforward web-based service designed with ease of use in mind.
Contract information stored in the Contracts Register can be made available for sharing and searching within an Authority. Signing up as part of a group opens up opportunities for contract alignment, consolidation and re-negotiation.
If the demand exists, there is scope for elements of the contract information in the Contracts Register to be made available to the general public, in accordance with guidelines in the national procurement strategy for local government.
Existing and Trial users should visit the existing users page to log in.
Anyone can browse contracts offered by the Office of Government Buying Solutions.
Copyright © 2005-2006 New Information Paradigms Ltd
2 of 24 - Clipboard
Item collected.
Start
Type to search
11:27

APPENDIX 1 – DATA STANDARDS

CRS Supplier Creation Rules

General

- Use no punctuation in the supplier name (e.g. John Bloggs & Co Ltd not John Bloggs & Co. Ltd.)
- Use upper / lower case (e.g. John Bloggs Ltd). Strictly no Capitals
- Use the name that is used on the contract, not the Parent or Holding Company unless that is what appears

Supplier Name

- If Limited (Ltd) or Public Limited Company (PLC) use the abbreviation
- 'Company' to be written in full
- Print name in full, copying the style of the supplier. Only use initials when used by the supplier e.g. J & J should be Johnson & Johnson, B T should be British Telecommunications plc

Supplier Address

- Enter street number/house name/trading estate name and street name, e.g. Amplevine House, Dukes Road
- Leave one space in the middle of the postcode

Telephone numbers

- Enter all numbers including dialling code, leave no spaces

APPENDIX 2 – MAINTAINING YOUR CONTRACTS REGISTER ENTRIES

All computer systems are only as good as the data entered onto the system. The old adage – "Garbage in Garbage out" – still applies. Therefore, to make the most of this powerful tool you need to ensure that the quality and completeness of the data entered is as good as possible but just as importantly it needs to be maintained to retain its currency otherwise it becomes redundant and of little value.

Contract owners and administrators should be continually reviewing the contracts to see if:

1. Suppliers details erroneously entered into the authority contact detail are moved to the new suppliers' detail fields and the correct contract contact details entered. To view the contacts set up on your organisation use the Departments and Contacts/User facility described on page 8 of this document to identify any changes necessary.
2. Ensure that the contacts have valid email addresses in order that people with their authority as well as in other authorities can easily contact them for information. Also the email alert for a contract which is going to expire will go to this address – if the address is not valid no email will be sent. **Worse still it may go to completely the wrong person**.
3. Check that the alert timeframes are sufficiently lengthy for the large contract, e.g. construction contracts, in order to give you time to look at possible collaboration and joint service delivery options.
4. Review the contracts which have expired in the last 7 days and check if extension have been made and if so ensure the details are now entered onto the system (remembering to update the new expiry date).
5. Check that any extension details are reflected in the contract values and end dates.

APPENDIX 3 – VALID CONTRACT TYPES

One-Off or Spot Contract

These are contracts to meet a specific need and will generally be short-term contracts to supply goods and services to meet an individual requirement, e.g. the supply of specialist scientific equipment for the Trading Standards Service or the supply of consultancy services for a particular project. These contracts are sometimes referred to as "Spot" contracts.

- **Note:** For One-Off or Spot Contracts only the following columns are mandatory: Title, Status and Contract Type

Renewable or "Period" Contract

These are contracts for services required on a regular basis and are generally let over a longer period of time (1-5 years) and will be monitored on a regular basis e.g. building cleaning, grounds maintenance.

Call-Off Contract

A call-off contract is used for the supply of a specific quantity (a minimum and maximum range can be specified) of goods or services over a given time period, subject to the prices, specifications and terms and conditions agreed. Delivery will be made either to a delivery schedule built into the call-off contract, or more usually by separate 'call-off' orders placed against the contract. In essence, a call-off contract is the same as a framework agreement except that the call-off contract is a legally binding contract with the supplier. An example would be a "Block" contract in the social care environment.

Partnership Arrangement

This is where the Authority seeks to develop a relationship with a supplier based on partnership principles (as distinct from a formal partnership) with a supplier thereby sharing the costs and risks involved, for example, civil engineering works and individual building.

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